



CALIFORNIA ORGANIZED
INVESTMENT NETWORK
Insurers investing in a better California

2nd ANNUAL COIN INVESTMENT SUMMIT July 16, 2015

Holiday Inn Sacramento - Capitol Plaza
RSVP Required: <http://goo.gl/forms/p2g6MUprvh>

AGENDA*

9:30 – 10:00 a.m.	Registration
10:00 – 10:10 a.m.	Welcome: Stacie Olivares-Castain, Managing Director, COIN
10:10 – 11:10 a.m.	Panel A – Case Study on COIN Tax Credit Investments Moderator: Michael Novogradac, Partner, <i>Novogradac</i> Diane Giampaoli, Tax Executive, <i>CSAA Insurance Group</i> Robin Hyerstay, Vice President, <i>Enterprise Community Investment, Inc.</i> Michael Hickey, Government Relations Counsel, <i>MetLife</i> Mary Rogier, President, <i>Northern California Community Loan Fund</i>
11:10 – 11:20 a.m.	Break
11:20 – 12:20 p.m.	Panel B – Insurer Evaluation of COIN Investments Moderator: Tomoko Stock, <i>California Department of Insurance</i> Ed Toy, Director, <i>NAIC Capital Markets Bureau</i> Kevin Zwick, President, <i>Housing Trust Silicon Valley</i> Douglas Bystry, President, <i>Clearinghouse CDFI</i> Mikiyon Alexander, Director, <i>Public Finance Ratings, Standard & Poor's</i>
12:20 – 12:45 p.m.	Award Presentation - Dave Jones, California Insurance Commissioner
12:45 – 1:30 p.m.	Lunch Break
1:30 – 2:30 p.m.	Panel C – Partnering Insurer Investors and Investment Opportunities Moderator: Daniel Brett, Manager, <i>InSight, Pacific Community Ventures</i> Monika Mantilla, CEO, <i>Small Business Community Capital</i> John Kinghorn, Corporate Social Responsibility, <i>Prudential</i> Jun Sakumoto, Partner, <i>Avanath Affordable Housing</i> Stephen Lee, Senior Associate, <i>RI-Impact Investing, TIAA-CREF/Financial Services</i>
2:30 – 2:45 p.m.	Break
2:45 – 4:30 p.m.	Matchmaking Event
4:30 – 4:45 p.m.	Closing Remarks - Dave Jones, California Insurance Commissioner Stacie Olivares-Castain, Managing Director, COIN

*Agenda subject to change